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10 JAN 1968

PROJECT OUTLINE

RETIREMENT COUNSELING AND PLACEMENT STAFF

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PROJECT SUBJECT: Provide for the Support of the Retirement Counseling and Placement Program in the Development of Agency Policy, Plans and an Organization to Improve the Present Program through a Broader Coverage of Retirement Services and Assistance

ORIGINATING OFFICE: Retirement Counseling and Placement Staff

FUNDS REQUESTED: For the remainder of Fiscal Year 1968,
\$47,500

CURRENT STATUS: New

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A. IDENTIFICATION

A Headquarters project under jurisdiction of the Retirement Counseling and Placement Staff, to support the Retirement Counseling and Placement Program for the Agency.

B. OBJECTIVES

1. Encourage and effect early retirement of employees who are eligible for optional retirement under the Agency and Civil Service Systems.
2. Provide services and assistance in order for Agency personnel to plan an organized retirement and to approach it confidently.
3. Improve the Agency's image and the morale of the employees realizing that the willingness of a person to retire is vital to his attitude and, in turn, is vital to the overall effectiveness of the retirement program.

C. BACKGROUND

1. The Retirement Branch of the Office of Personnel was created by the Director of Personnel in September 1965, and consisted of four positions. A year later, the Branch was reorganized to contain a T/O of twelve positions and then in February 1967, a proposal was submitted by the Director of Personnel and approved by the Executive Director-Comptroller providing for an expanded retirement program which grew into what is now the Retirement Counseling and Placement Staff.

2. Interviewing of prospective retirees began in November 1967, and was confined, at first, to those retirees scheduled to leave before the end of calendar year 1967. As the interviews progressed, the scope of coverage was expanded to include those retirees leaving before March 1968. The following constitutes the number of interviews by major component:

DCI		1
DDP		21
DDS		17
Logistics	11	
O/F	4	
Security	2	
DDI		10
	5	
CBS	1	
NPIC	1	
OCI	2	
ORGI	1	
Director	1	

NOTE: Of the 50 interviewed, 16 are retiring under the Agency Retirement System and 34 under the Civil Service System.

50 Total

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D. PERSONNEL ASSETS

Personnel - Personnel included within this project may be re-employed annuitants hired as either independent contractors or contract employees. An independent contractor may be called upon to prepare one or more specified papers on his actual retirement experience, taking in such factors as cover problems, use of leisure time, place of retirement, etc. A contract employee may be asked to:

1. Provide statistical and research support for the retirement program.
2. Conduct continuing surveys to identify possible employment opportunities for retirees.
3. Compile an inventory of Agency officials having close contacts with senior officers of non-governmental organizations.
4. Develop more comprehensive contacts with academic community to facilitate the referrals of retirees desiring to enter the teaching profession.

E. AREAS OF CONCENTRATION

1. The Retirement Counseling and Placement Staff will be responsible for the acquisition of information that is needed to carry out an adequate program. This will include interviews of persons planning retirement, preparation of packet handouts, conduct of surveys, ads and clipping services, maintenance of reference materials and direction of supplemental placement facilities.
2. In the area of indoctrination and conditioning of employees toward retirement, the Staff will be involved in the preparation of Agency notices and bulletins, and recommendation of bonuses, awards, and commendations.
3. The Staff will be responsible for the conduct of individual counseling as an area of concentration which will include coordination with the employee's career service, preparation of questionnaires, identification of problems and related considerations, A & E processing and the extent and substance of centralized Agency counseling.

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E. AREAS OF CONCENTRATION Cont'd

4. A primary area of concentration for the Staff is the arrangement of Special Seminars on Retirement. In carrying out this responsibility, the Staff must analyze programs of other organizations, government and non-government, and compare them with the Agency's needs, identify types of participants for each seminar, arrange a schedule of special seminars and lecturers, and prepare a kit for each participant containing brochures, pamphlets, etc. on retirement.

5. On Re-education or new training for retirees, the Staff must use existing OTR courses and off-campus courses under Agency sponsorship, arrange half-time work schedules and the use of early retirement with re-employment rights.

6. Another area of concentration for the Staff concerns legal and regulatory actions. In this area, there is involved the payment of awards, bonuses, and tuition covering training and instruction courses, final transfer to permanent residence and terminal promotions.

7. Lastly, the Staff will be responsible for retiree marketing and the maintenance of post-retirement relationships.

F. SECURITY EVALUATION

1. Documents - Documentation will be acquired, used and controlled in accordance with existing regulations, and with due consideration of sensitivity of content.

2. Personnel - Personnel will be fully cleared and in all cases their work will be conducted in Agency controlled areas. There are no special security risks or disposal problems connected with the project.

G. COORDINATION

1. Controls - The case of each person to be hired will be coordinated first by the Retirement Counseling and Placement Staff with the DIS components concerned. In the case of arranging non-Agency lecturers at the retirement seminars, appropriate coordination will be made with OTR.

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G. COORDINATION Cont'd

2. Assessment - Hiring is based on assessment of personal qualifications and the special tasks to be performed.

3. Qualifications - Qualification requirements established in collaboration with the Office of Personnel and the extent, nature, and degree of difficulty of the assigned task will be the basis for judgment in determining the contract level.

H. CONTROL

This project will be under the immediate control of the Retirement Counseling and Placement Staff.

I. COSTS

1. Fiscal Year 1968 (Approximately five months)

(a) Personal Services

1 GS-16 Chief	\$10,000
1 GS-15 D/Chief	8,700
2 GS-13 Emp. Rel. Off.	14,000
1 GS-12 Emp. Rel. Off.	5,400
1 GS-07 Sec'y Steno	3,200
1 GS-06 Sec'y Typist	2,900

(b) Speaker Fees

3 Non-Agency Lecturers	300
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(c) Travel

Speaker Travel	200
Staff travel plus per diem	500

(d) Office Equip/Supplies

Reading Room Furnishings	1,200
Vinyl Briefcases	
\$3.00 x 200 retirees	600

(e) Publications

Seminar Kit	
\$2.50 x 200 retirees	500
GRAND TOTAL	\$47,500

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2. Protection of Project - It is estimated that the requirements for Fiscal Year 1969 will be approximately \$125,620.00. This does not include the \$1,200.00 item for office equipment, since it is a one-time requirement. However, additional requirements are included providing for overseas TTY travel in the amount of \$4,500.00 and for the contract employment of an Agency annuitant (equivalent GS-14 rating) for approximately six months. During FY 1969, it will be necessary to hold briefing sessions on retirement for the personnel stationed overseas and in keeping with this it is planned to send two staff employees [REDACTED] for four days at each of these locations. These visits could coincide with the annual support conferences normally held in the Far East and European areas. The employment of an Agency annuitant would amount to about \$10,000.00 and this would be for essential research, interviewing and writing which could not be performed by the regular members of the Staff.

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SECRET

13 DEC 1967

P
15-13

MEMORANDUM FOR: Chief, Plans & Review

SUBJECT : OPM 1-14-9

Jim:

1. Attached is a new draft of OPM 1-14-9 dated 1 December 1967. Please rescind the 1 December version and prepare a new one based on the draft.

2. The changes to be reflected are the changing of Retiree Placement and Counseling Staff to Retirement Counseling and Placement Staff, adding [REDACTED] and his title to the new staff on the Key Personnel List. Also, delete External Placement Branch from the Recruitment Division section of the Organizational Chart. Please get in touch with me if there are any questions.

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[REDACTED]
Assistant Executive Officer
Office of Personnel

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Att.

Distribution:

- O & 1 - Addressee
- ✓ - D/Pers Subject
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OD/Pers/ [REDACTED] mtw (13 Dec 67)

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